Commonwealth of Virginia

Data Management Program
Quarterly Update

July 14, 2009

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Agenda

- Update on Data Standards Work

    - *Vendor Data Standard*

    - *Procurement to Payment Data Standard*

    - *HR efforts*

- Plans for FM, PB and CSI Projects

- Update on Commonwealth Data Strategy

Vendor Data Standard

WHO

- ***Community of Interest (COI)***
  - Division of Purchases & Supply (DPS)
  - DOA
  - VITA SCM

- ***Agency Leads***
  - Jan Fatouros – DPS
    - Bob Sievert, Data Steward
    - Becky Barnett
  - Kim White – DOA Data Steward
    - Randy McCabe
  - Susan Woolley – VITA SCM

- ***Subject Matter Experts (SMEs)***
  - Bryan Wagner – DGS Finance
  - Dana Smith – VITA Finance
  - Cynthia Parker – VDOT Finance
  - Patti Higgins - Tax
  - Martha Laster – DOA-Payroll
  - Norma Roberts – DOA A/P

- ***Enterprise Data Architect***
  - John Morgan - EAD

WHAT

Scope of Vendor Data Standard

- Defines vendor data that is required to support the purchase and payment of good and services pursuant to the Code of Virginia.

- The data standard includes the mandatory data requirements for information collected about vendors.

- This standard applies to all agencies and institutions.

- A vendor is defined as an individual, public body, or business who desires to sell goods or services to the Commonwealth.

Metrics
- 19 data entities
- 196 data attributes
- 22 relationships between entities

Vendor Data Standard

HOW

- ***Data Standardization Process (Phase 1-2)***
  - Collected data requirements
  - Researched topics
    - Federal & state requirements
    - Commerce standards (XML)
  - Drafted a data model
  - Reviewed model with SMEs
  - Refined model based on feedback
  - Reviewed with Enterprise Data Architect

- ***Phase 3 – Formal Review (7-09)***
  - Finalizing COI feedback
  - Discussing VITA review process
  - Who do we need feedback from?

- ***Phase 4 – Resolve Comments***
  - EAD will work with COI to resolve comments

- ***Phase 5 - Approvals***
  - Discussing VITA approval process

EFFORT

- ***DPS Lead – Jan Fatouros***
  - 408 hours from January – June 2009

- ***EAD Data Architect***
  - 120 hours from May – July 2009

- ***5 Review Sessions with SMEs***
  - 100 hours combined effort

WHEN

- Short term implementation plan around Vendor Name (eVA & CARS)

- 2010 implementation plan to meet SB936 mandate (eVA & CARS)

- Data Standard for adoption in July 2009 which is the "to-be" plan (eVA & new FM)

What have we learned?

- Even within a single agency our data requirements are not well documented

- Data management gets fuzzy as data travels from application to application

- Must have Co-Leadership within a Community of Interest to finalize the standard – Commitment from everyone!

- The business must lead the effort with IT supporting. The business has the knowledge of policies, process and should drive the "to-be" vision

- Commonwealth lacks business process owners for those processes that crossover agencies – illustrates the need for enterprise Data Governance (especially within the Central Agencies)

Procurement To Payment Data Standard

- *Data required for purchase transactions – DPS and VITA SCM*
  - Solicitations
  - Contracts
  - Requisitions
  - Purchase orders
  - Receipts

- *Data required for fiscal transactions - DOA*
  - Invoices
  - Vouchers
  - Payments

- *Same COI as Vendor, Additional SMEs*

- *Target timeframe – December 1, 2009 (SB 936 mandate)*

Quick Look at the Vendor Data Model

Employee & Timecard Data Standard

Goal: Support VDOT Financial Management Project

Scope
- Employee Profile and Position data
- Time and Attendance
- Leave

Commitment
- Need to create a Community of Interest
  - DHRM,DOA-Payroll, Agencies with TAL requirements
- Need co-leaders from business to lead effort
- EAD will commitment data architect role
- Identify SMEs required to build data model

- **This data standard will benefit the TAL shared service and the development of data exchanges for PMIS and CIPPS**

Financial Management - Data Standards

Financial Management Project (DOA and VDOT)

- **Chart of Account Data Standard**
  - COA Work Group is the Community of Interest
  - Draft data standard – entity level
  - Intend to finish data standard at attribute level during FM Project Analysis and Design Phase
  - Timeframes – to be announced

- **Other FM Data Standards**
  - Analyze the data interfaces/exchanges requirements for the new FM system and identify the enterprise data standards that must be defined.
  - Define the COI
  - Develop the data standard
  - Explore industry standards (e.g. XBRL)

Performance Budgeting - Data Standards

Performance Budgeting Project (DPB)

- Analyze the data interfaces/exchanges requirements for the new performance budgeting system and identify the enterprise data standards that must be defined.

- Define the COI

- Develop the data standard

Other Data Standards

DMV's CSI Project

- DMV is analyzing their agency data requirements and data exchanges and identifying areas where they can standardize.

- EAD will be working with DMV to determine enterprise opportunities for data standardization.

- COIs will be developed for the enterprise data that needs to be standardized. Targeting November 2009 to complete analysis.

Health IT Standards

- General Assembly gave the ITIB authority to appoint a Health IT Standards Advisory Committee to advise the Board on approval of nationally recognized technical and data standards for health information technology systems or software.

- First meeting of HITSAC is July 16. This 5 member committee is chaired by Dr. Marshall Ruffin, Chief Technology and Health Information Officer for UVA Health System.
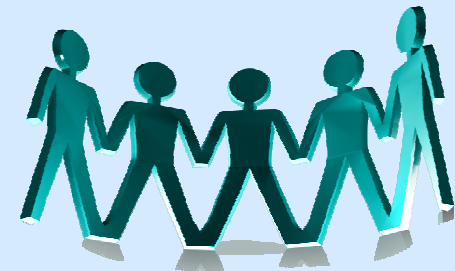
Commonwealth Data Strategy

Data Strategy Work Group

- IT Investment Council – develop a Data Strategy for the Commonwealth

- Members have been collaborating March – June 2009

- Representatives from the following agencies

    - VEC – Virginia Employment Commission
    - DMV – Department of Motor Vehicles
    - DSS – Department of Social Services
    - DHP – Department of Health Professions
    - DRS – Department of Rehabilitative Services
    - TAX – Department of Taxation
    - VDOT – Department of Transportation
    - JCOTS – Joint Commission Technology & Science
    - VITA – Virginia Information Technologies Agency

Data Strategy Scope

- High level approach
  - Identifies a vision for enterprise data management and
  - Goals and objectives to achieving the vision

- Purpose of the Strategy
  - Introduce data management concepts and best practices to Commonwealth leadership
  - To guide enterprise data initiatives

What is Enterprise Data?

- Enterprise data is data that is collected by two or more state agencies or data shared between states or other entities.

- Example categories of enterprise data – vendor and citizen data

Business Drivers

- *The Data Strategy*

    – Identifies high level business drivers which are supported by enterprise data management activities

    – Describes 4 business priorities categorized as enterprise data initiatives:
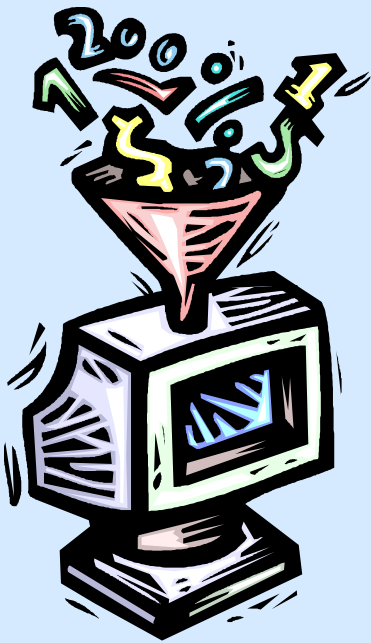

    - Evaluating the performance of workforce programs

    - Simplifying the process of registering a business in Virginia

    - Providing transparency in regards to enterprise vendor relationships

    - Standardizing and managing "master" data – for example vendor and citizen data

Enterprise Data Initiatives

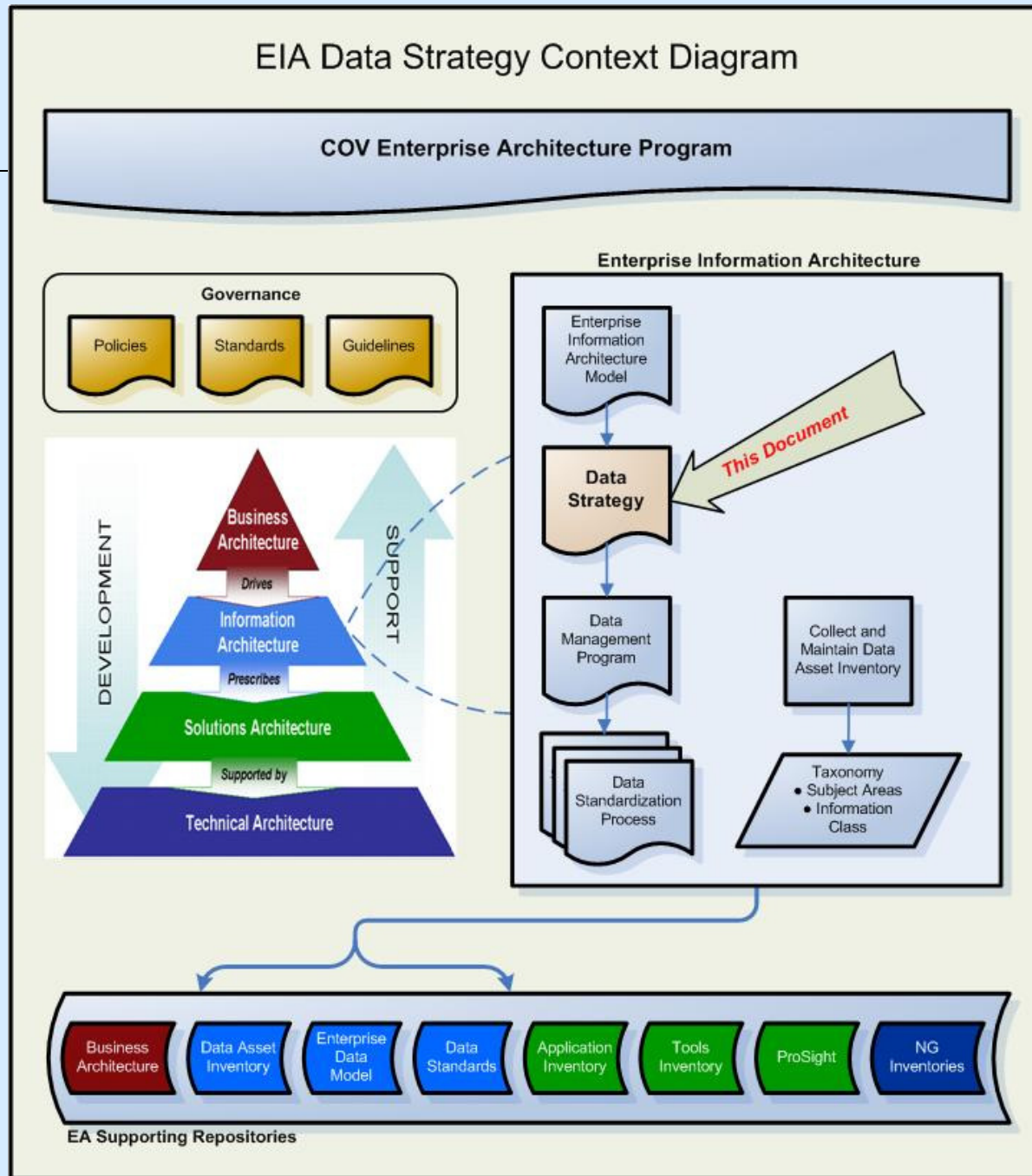- **Common Characteristics**

  - Defining a common data model to meet business requirements

  - Identifying roles and responsibilities for managing common data

  - Defining how to populate and store, on an ongoing basis, the common data

  - Defining a data quality process for ensuring a level of fitness for intended use

  - Implementing a means of providing access to the shared data.
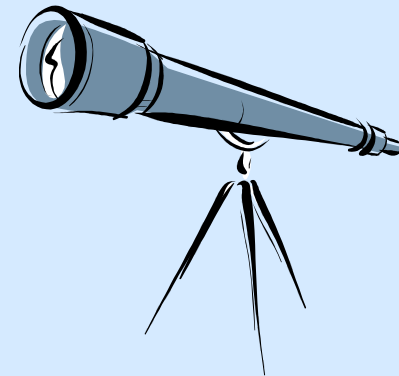
EIA Data Strategy Context Diagram

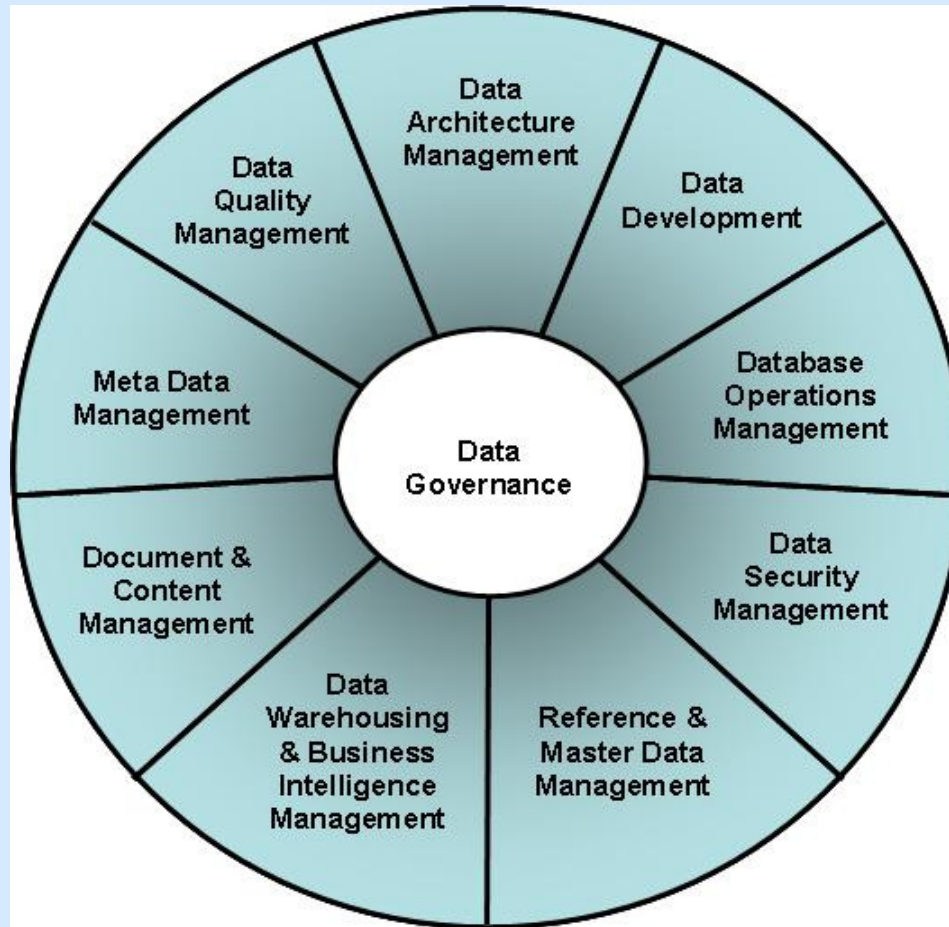Enterprise data and information is managed as a Commonwealth asset to provide value to our citizens and stakeholders.

1. **Implement an enterprise data management program**

2. **Enable data sharing**

3. **Establish data governance and oversight**

Data Management Functions

Data governance is essential to managing a successful data management program

What we need from you?

- Feedback from the business, we've heard from IT
  - Weigh in on your concerns

- Support for Data and Application Governance
  - Participation in the Governance Work Group or
  - Feedback on their deliverables

- Commitment to data management roles within your organization
  - Data Stewards and Data Architects

Discussion

Next Quarterly Meeting
October 13, 2009